



# Vendor Evaluation

FOR MARKETING, PUBLIC RELATIONS & DESIGN

407-474-6488

kwphillips@phillipsmarek.com

Selecting a vendor to handle your organization’s marketing, public relations and/or design needs can be a daunting task, especially if it’s not your area of expertise. To help you ask the right questions and anticipate your future needs, we’ve created this vendor evaluation form so you can identify a trusted partner. **IMPORTANT: Please download this form and save to your hard drive before answering the questions, otherwise the answers will not be saved.**

VENDOR NAME/CONTACT: \_\_\_\_\_ DATE: \_\_\_\_\_

## About the Company

- Y N The vendor has demonstrated standards of excellence and ethics.
- Y N The vendor has experience in our industry.
- Y N The vendor also has experience in a variety of other industries and organizations, allowing them to draw upon different perspectives.
- Y N The vendor has long-standing client relationships with references that can be verified.
- Y N The vendor remains active in professional organizations and current in technological advancements.

## Services

The vendor can accommodate our current needs, as well as those we may have in the future. Some examples are listed below.

- |  |  |  |
|--|--|--|
| <input type="checkbox"/> Advertising             | <input type="checkbox"/> Digital Marketing           | <input type="checkbox"/> Public Relations          |
| <input type="checkbox"/> Animated & Static Logos | <input type="checkbox"/> Graphic Design              | <input type="checkbox"/> Reputation Management     |
| <input type="checkbox"/> Books & Jackets         | <input type="checkbox"/> Journals & Long Documents   | <input type="checkbox"/> Short-form Videos         |
| <input type="checkbox"/> Branding                | <input type="checkbox"/> Media Relations             | <input type="checkbox"/> Social Media              |
| <input type="checkbox"/> Community Engagement    | <input type="checkbox"/> Media Spokesperson Training | <input type="checkbox"/> Special Events            |
| <input type="checkbox"/> Consulting              | <input type="checkbox"/> Messaging                   | <input type="checkbox"/> Speech Writing & Training |
| <input type="checkbox"/> Copywriting             | <input type="checkbox"/> Online Marketing            | <input type="checkbox"/> Strategic Planning        |
| <input type="checkbox"/> Crisis Management       | <input type="checkbox"/> Product & Service Rollouts  | <input type="checkbox"/> Tradeshows & Conferences  |
| <input type="checkbox"/> Customer Relations      | <input type="checkbox"/> Public Education            | <input type="checkbox"/> Websites & SEO            |

## Servicing Our Account

- Y N All members of the vendor’s team are experienced and efficient.
- Y N Account management will never be passed off to junior-level personnel.
- Y N The vendor’s team has a mix of business, technical and creative professionals.
- Y N The vendor’s structure allows for the appropriate staffing level.
- Y N Commitments made by the vendor seem reasonable and attainable.

## Financial Considerations

- Y N The vendor's cost structure is in line with our organization's budget.
- Y N Multiple rate structures are available should our needs or financial position change (i.e., hourly fee, monthly retainer, project rate).
- Y N Standard out-of-pocket expenses like stock photography and mailing lists are billed without a markup.
- Y N The option exists to pay larger expenses like printing and media buys directly, avoiding the customary 15% agency markup.
- Y N The vendor's billing aligns with our accounting needs.
- Y N The contract has an easy out-clause, should we need to end the relationship for any reason.

## Overall Impressions

- Y N The vendor demonstrates a clear understanding of our needs.
- Y N The vendor can handle our account as business grows.
- Y N Throughout our interactions and negotiations, the vendor has spent more time providing me with good counsel vs. "selling me."
- Y N The vendor has provided a clear sense of what it is like to work with them.
- Y N The vendor seems like a good fit for our organization.
- Y N I like them!

## Notes